THE NEW EU AGENDA:
FROM SOCIETAL TRENDS TO POLICY DIRECTIONS

EUROPEAN PUBLIC AFFAIRS
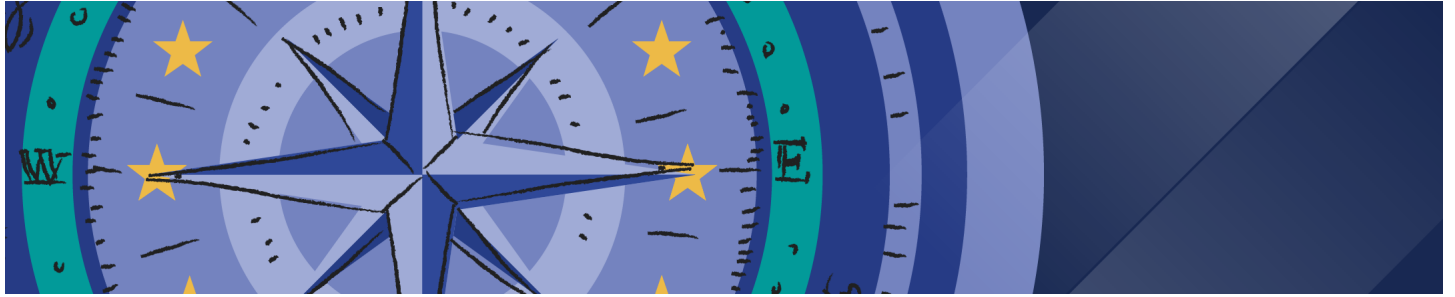
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Interactive document

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EDITORIAL

Dear reader
Welcome to the first 2025 edition of our European Public Affairs Digest!

As the new year begins the European Commission is advancing its political priorities for 2024-2029. These priorities encompass a broad spectrum of ambitions, from bolstering security and defence, to promoting sustainable competitiveness and reinforcing the EU's global presence. In this edition of our Digest, we delve into several critical policy areas where these overarching ambitions intersect with challenging societal trends.

Our first article focuses on the complex topic of **EU enlargement**, which has gained renewed importance with recent geopolitical shifts. As the Commission continues to navigate accession talks with potential new members, our analysis explores public sentiment across current Member States. Understanding these perspectives is crucial as the EU seeks to balance the goal of a larger, stronger Europe with internal cohesion and stability.

Environmental sustainability remains at the forefront of the EU policy agenda, with attention now focused on implementing the European Green Deal and financing the green transition. Our second article examines a persistent challenge in this domain: the gap between public concern about climate change and individuals' willingness to take concrete action to help address it. This disconnect poses a significant hurdle for policymakers as they strive to implement ambitious climate targets. Our piece offers insights that can inform strategies for public engagement in this critical area.

Our third article addresses **Europe's skills mismatch**, an issue that directly impacts the Commission's goals for a competitive and socially fair Europe. The rapidly evolving job market, driven by digitalisation and automation, has

seen a significant gap emerge between the skills required by employers and those available among the workforce. Our piece considers the extent of the gap, before describing innovative approaches underway to better understand and address it.

Finally, we turn our attention to **the growing problem of vaccine hesitancy**, which has the potential to undermine European health policy and crisis preparedness. We examine the factors contributing to hesitancy, and consider counter-strategies, with a particular focus on the importance of health literacy as a lever of disease prevention and control.

Elsewhere in this edition, you can find our usual publications section, which features our **recently-released study on the state of democracy across selected EU Member States**. It considers how citizens perceive current democratic functioning in their respective countries, their appetite for reform and their views on political participation.

We hope you enjoy reading the Digest. As always, we remain committed to providing you, our readers, with nuanced analysis of the most pressing issues facing Europe.

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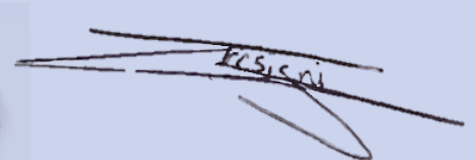
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THE EU AT A CROSSROAD:
WHERE NEXT?

The future expansion of the European Union (EU) was a key focus in a **speech** that European Commission President Ursula Von der Leyen gave to present her 2025-2029 programme for a second mandate. She highlighted the strategic importance of integrating countries like the Western Balkans, Ukraine, Moldova and Georgia into the EU, recognising their long-standing commitment to freedom and democracy. Her subsequent **mission letter** to the Commissioner-Designate for Enlargement stated that "further completing our Union is a geostrategic, economic and moral imperative". A recent **Enlargement High-Level Forum** held by the European Economic and Social Committee (EESC) echoed this sentiment, emphasising the importance of thinking about *how* to enlarge, rather than *whether* to enlarge. But are European citizens themselves behind the idea of a larger EU?

The European Union finds itself at a pivotal moment in its history, grappling with both internal and external challenges that are testing its core foundations. Political and societal fragmentation, exacerbated by economic disparities, rising nationalism and cultural divides, are testing the EU's vision of unity and prosperity. This has been evidenced in the successful showing of right-wing conservative and far-right parties in the 2024 European Parliament elections. Together, these parties secured 26% of seats, up from 17% in 2019. Geopolitical instability beyond the EU's borders, such as the ongoing conflicts in Ukraine and the Middle East, is further complicating matters by raising concerns about regional security and migration. Amidst this turbulence, the question of future EU expansion becomes a challenging one for the Commission.

Indeed, research we recently conducted for the Wilfried Martens Centre for European Studies suggests there is currently limited enthusiasm among EU citizens for a larger Union: Whereas 38% of these citizens think the EU should be looking to add more members at the moment, a similar proportion – 31% – think it should not, and a further 20% are indifferent or have no opinion on the matter. The research also found that support for enlargement (as far as it exists) is contingent on the specific candidate country in question, ranging from 41% for Ukraine and 35% for the Western Balkan countries, to just 23% for Turkey (Figure 1).

Figure 1: Views on specific (candidate) countries joining the EU

■ Should be allowed to join EU   ■ Should not be allowed to join EU

Country	Should be allowed to join EU	Should not be allowed to join EU
Ukraine	41%	34%
The Western Balkan countries	35%	32%
Moldova	34%	28%
Georgia	32%	32%
Turkey	23%	51%

Base: N=25844 (All respondents) | **Source:** Pan-European survey on EU enlargement and deepening, conducted by Ipsos European Public Affairs on behalf of the Wilfried Martens Centre for European.
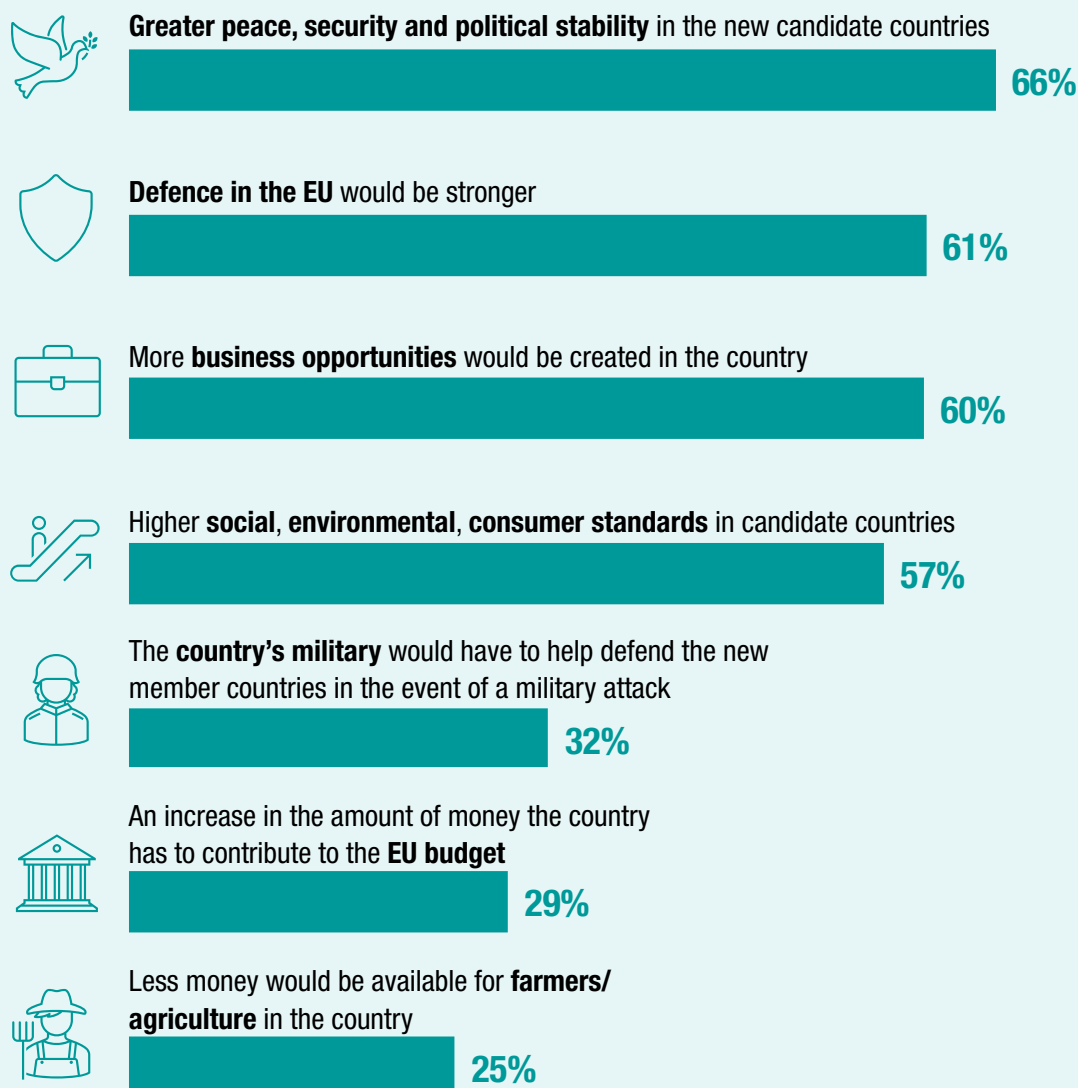
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A segmentation analysis conducted as part of the [same study](#) further revealed that only 25% of EU citizens can be defined as "enlargement enthusiasts" (i.e. unequivocally supportive of EU expansion), while slightly more – 28% in total – are disillusioned about, or outright opposed to, further enlargement. These sceptical population segments share concerns about the potential consequences of EU expansion on national sovereignty, migration management, border control and the availability of economic resources for member countries. Effectively addressing these concerns will be crucial if EU policy-makers are to build citizen consensus for any further enlargement of the Union.

Despite disillusionment and scepticism, the research also found that about three in five European citizens would be more likely to support EU enlargement under specific conditions – namely, if it would lead to greater peace, security and political stability in the new member countries; if it would create a stronger EU defence; and if it would lead to more business opportunities in the EU (Figure 2). Further, almost four in five citizens would welcome more information from the EU about the benefits and risks of candidate countries joining the EU – and most are also in favour of the public having a direct say in decisions about which countries should be able to join. Arguably, all of this presents an opportunity for EU policy-makers to transform citizens' concerns into informed engagement, whilst simultaneously working towards greater transparency in decision-making processes.

Figure 2: Factors likely to influence support for candidate countries joining the EU

Showing sum of responses "a lot more likely" and "a little more likely"

Greater peace, security and political stability in the new candidate countries
66%

Defence in the EU would be stronger
61%

More **business opportunities** would be created in the country
60%

Higher **social**, **environmental**, **consumer standards** in candidate countries
57%

The **country's military** would have to help defend the new member countries in the event of a military attack
32%

An increase in the amount of money the country has to contribute to the **EU budget**
29%

Less money would be available for **farmers/ agriculture** in the country
**25%**

Full report

Base: N=25844 (All respondents) | **Source:** Pan-European survey on EU enlargement and deepening, conducted by Ipsos European Public Affairs on behalf of the Wilfried Martens Centre for for European studies.

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In all, our research shows that the prospect of further EU enlargement raises a host of competing considerations in the minds of citizens that must be acknowledged and carefully addressed as the EU charts a course forward. Clear, transparent communication will be key in this regard. The EU must set out the potential benefits of a wider, more integrated Europe, while acknowledging potential challenges. Facilitating diverse channels for citizen engagement, including potentially public votes or surveys, will be vital for building a Union that reflects the diverse needs and aspirations of all its members.

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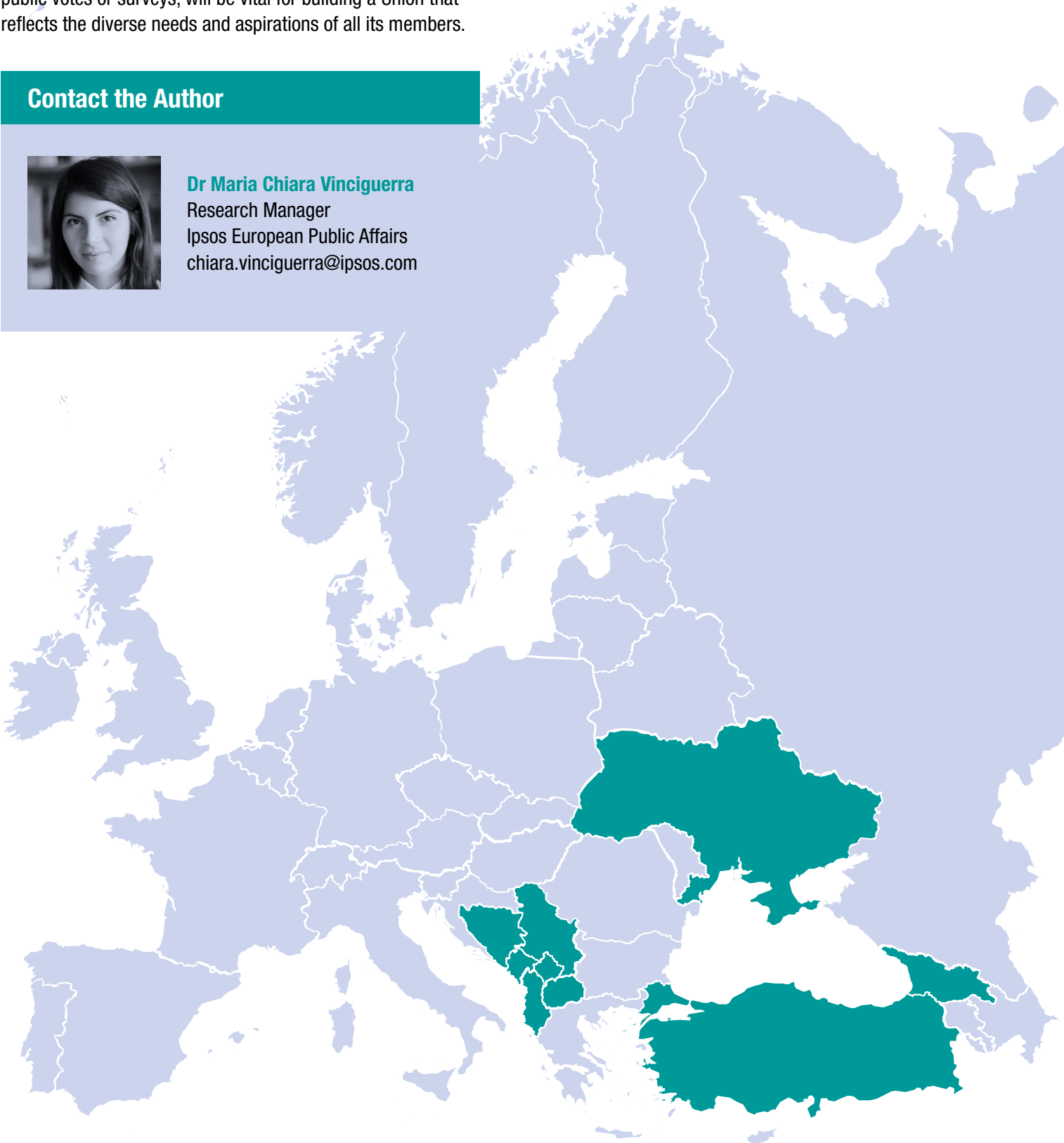
FROM AWARENESS TO ACTION:
BRIDGING THE EU'S CLIMATE POLICY DIVIDE

Despite growing evidence of the environmental challenges facing the EU, the bloc's citizens continue to display ambivalent attitudes towards climate action. On the one hand, a majority express significant concern about climate change and believe policymakers need to take prompt and decisive actions. On the other hand, many remain sceptical of specific public policies aimed at addressing the issue. This begs the question: What is at the root of such ambivalence and what, if anything, can policymakers do about it?

In a recent Flash Eurobarometer (2024) survey we conducted among EU citizens, 'environmental issues and climate change' emerged as the third (out of ten) most-cited challenge facing the EU, behind only the war in Ukraine and irregular immigration (Figure 1). In a separate Flash Eurobarometer, ´climate change and the environment' (24%) also emerged as one of the perceived most important dimensions for Europe's *future*, with only 'the economy, social justice, and jobs' seen as more important.

Figure 1: Perceived main challenges currently facing the EU

Challenge	%
The war in Ukraine	50%
Irregular migration	41%
Environmental issues and climate change	35%
The cost of living	32%
Terrorism and security issues	29%
Social inequalities	21%
The conflict in the Middle East	20%
Insufficient economic growth	19%
Disinformation and information manipulation	19%
Impact of digital technologies on society	8%

Base 25,658 – All respondentsSource: Flash Eurobarometer 550 – EU challenges and priorities

Reflecting this, a majority of EU citizens agree there is an urgent need to act now to address climate change. Indeed, according to another Ipsos study conducted in April 2024, a plurality of citizens in EU countries think that if their country's government does not act now to tackle the problem, it will be failing the people of their country. The proportion of citizens holding this view ranges from 47% in Germany to 64% in France.

In response to this call for action, but also with the aim of positioning itself as a prominent actor in the energy transition, the European Commission has led an active agenda over the past five years to put the EU on a path towards carbon neutrality. Environmental sustainability now attracts a significant portion of the EU budget, including the NextGenerationEU economic recovery plan. Moreover, the EU has adopted a comprehensive set of legislation, in the form of the European Green Deal, to achieve a more resource-efficient and less carbon-intensive economy. As a result, many EU Member States are implementing new legislation to reduce greenhouse gas emissions. These measures include restricting high-polluting vehicles from entering low-emission zones, banning fossil fuel boilers in new homes, and providing incentives for the use of renewable energy, among others.

Many of these policies have been negatively received by the public, however, who tend to question their legitimacy. For example, Ipsos has found that fewer than half of citizens in the EU, UK and Norway favour banning the sale of new petrol or diesel cars within 15 years, limiting access to city centres to electric or hybrid cars, making energy sources that are more CO_2 intensive more expensive, or increasing tax on household waste to encourage people to waste less. Citizens are also often doubtful regarding the likely efficacy of such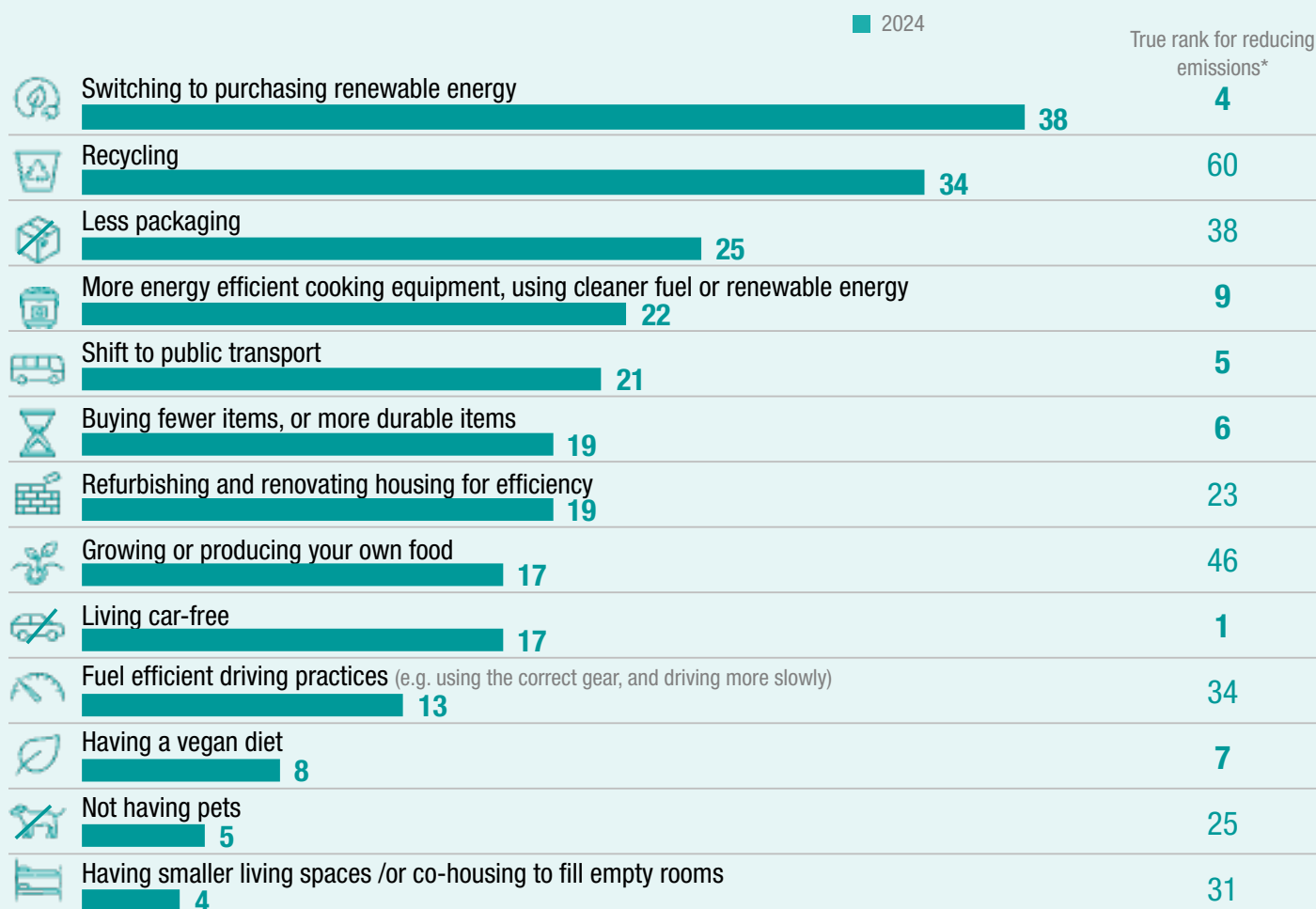 measures. Indeed, in the EU, fewer than half of citizens think the European Green Deal will be effective in helping to tackle the climate challenges facing the bloc.

The low level of support for climate policies may indicate that citizens in the EU (and elsewhere) are reluctant to translate their concern about climate change into concrete actions; a phenomenon that has been referred to as the 'say-do gap'. Understanding this disconnect is crucial for achieving the objectives of the EU climate agenda.

From a behavioural perspective, several mechanisms may drive the observed discrepancy between citizens' expressed concern about climate change and their commitment to taking action. A first explanation may be that survey results simply overstate their concern, due to social desirability bias – a tendency for survey respondents to answer questions in a manner they deem to be socially acceptable (or politically correct), irrespective of whether or not the answer actually reflects their true opinion on the matter. A second possible explanation for the 'say-do gap' is that citizens may lack knowledge and understanding about which actions are most effective in reducing carbon emissions, a phenomenon that has been termed the 'believe-true gap'. For example, Ipsos data shows that recycling and reducing packaging are still perceived among citizens globally as principal measures they can take to reduce their carbon footprint (2024), whereas academic research has shown that these practices rank very low in terms of the actual impact they have on reducing emissions. Conversely, 'living car-free,' which is considered in the scientific literature to be the most effective behaviour that individuals can take to reduce greenhouse gas emissions, is seen as an impactful action by only 17% of citizens (Figure 2). Finally, there is evidence that citizens' perceptions of climate policies are conditioned by the way climate issues are framed. For example, data collected by Ipsos in the UK

Figure 2: Perceived most impactful actions to reduce greenhouse gas emissions vs. true rank – the "believe-true gap"

■ 2024

True rank for reducing emissions*

Action	2024	True rank
Switching to purchasing renewable energy	38	4
Recycling	34	60
Less packaging	25	38
More energy efficient cooking equipment, using cleaner fuel or renewable energy	22	9
Shift to public transport	21	5
Buying fewer items, or more durable items	19	6
Refurbishing and renovating housing for efficiency	19	23
Growing or producing your own food	17	46
Living car-free	17	1
Fuel efficient driving practices (e.g. using the correct gear, and driving more slowly)	13	34
Having a vegan diet	8	7
Not having pets	5	25
Having smaller living spaces /or co-housing to fill empty rooms	4	31

Base: 24,290 online adults under the age of 75 | **Source:** Ipsos Earth Day poll 2024 | ***Source:** Ivanova et al., 2020. Quantifying the potential for climate change mitigation of consumption options. Available here: https://iopscience.iop.org/article/10.1088/1748-9326/ab

shows that support for net-zero policies tends to decline when potential lifestyle changes and especially cost implications are highlighted. However, when co-benefits such as cost-saving, convenience, or health benefits are emphasised, support tends to rise.

So how can policymakers seek to bridge the gap between citizens' expressed concerns about climate change and their negative assessment of current climate action policies? Most fundamentally, our research suggests that information is crucial. Policymakers and society as a whole must invest more in explaining which actions are most impactful in reducing our collective carbon footprint. This approach may not only help garner further support for policies grounded in scientific evidence, but also promote greater citizen engagement with the issue; for example, informed citizens may be more inclined to take personal actions to reduce their carbon footprint, actively communicate with their peers about climate issues or consider environmental policies more carefully when voting.

At the same time, our data shows that policymakers must be transparent about the costs and practical consequences of net-zero policies whilst also more effectively communicating the positive aspects. For example, adopting a more resource-efficient heating system or switching to greener transportation methods may be more costly in the short term and may require lifestyle changes, but these changes can bring significant health benefits and lead to cost savings in the long run. Finally, work we have conducted for the OECD shows that affordability and convenience are key to understanding – and encouraging – public support for climate policy. Behavioural change will only occur if we provide better financial and material support to households and consumers, and create ready-to-use, convenient alternatives to carbon-intensive lifestyles.

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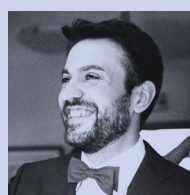
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FROM DATA TO ACTION:
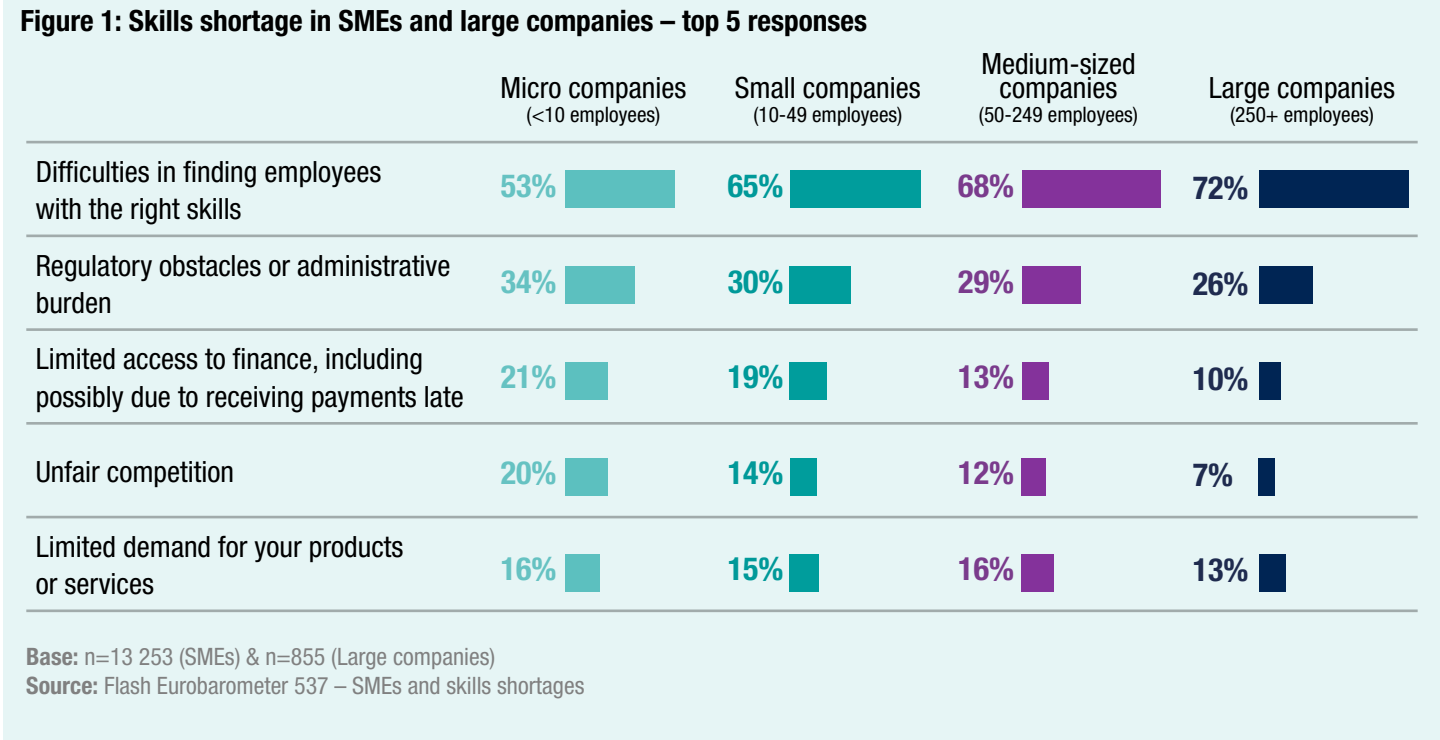## INNOVATIVE SOLUTIONS TO TACKLING EUROPE'S SKILLS MISMATCH

A disparity between workers' skills and those demanded by employers continues to challenge European Union (EU) economies. As we enter a new year, the question is not whether this problem exists but how it can be addressed effectively to ensure a resilient, green, and digital Europe that is competitive on the global stage.

This article details the extent of the skills mismatch challenge from the perspective of employers themselves. It then describes some innovative approaches to tackling the problem, with a particular focus on aspects of the **Horizon 2020 TRAILS (Transformative Research Activities, Innovative approaches, and Learning Strategies)** project.

A recent Flash Eurobarometer Ipsos conducted for the European Commission Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs, confirmed that skills shortages are a severe problem for most European businesses – including 53% of micro companies, 65% of small companies, 68% of medium-sized companies and 72% of large companies. Skills shortages are particularly pronounced for technical roles, with about half of companies in the industrial and manufacturing sectors reporting challenges in finding candidates for such positions.

Companies facing skills shortages cite the main reasons as being a lack of appropriate qualifications, skills, or experience among applicants. A similar proportion report receiving few or no applications for some open positions.

Figure 1: Skills shortage in SMEs and large companies – top 5 responses

	Micro companies (<10 employees)	Small companies (10-49 employees)	Medium-sized companies (50-249 employees)	Large companies (250+ employees)
Difficulties in finding employees with the right skills	53%	65%	68%	72%
Regulatory obstacles or administrative burden	34%	30%	29%	26%
Limited access to finance, including possibly due to receiving payments late	21%	19%	13%	10%
Unfair competition	20%	14%	12%	7%
Limited demand for your products or services	16%	15%	16%	13%

Base: n=13 253 (SMEs) & n=855 (Large companies)
Source: Flash Eurobarometer 537 – SMEs and skills shortages

This study was conducted not only among businesses in the EU but also among those in several non-EU countries (Canada, Iceland, Japan, Norway, North Macedonia, Switzerland, Türkiye, the UK and the US). A comparative analysis of the data by the European Commission Joint Research Centre (JRC) concluded that EU companies faced greater difficulties in finding and recruiting candidates than their non-EU counterparts.

The EU is actively seeking to address the skills mismatch through its European Skills Agenda, which aims to align individual skills with labour market needs. Initiatives like the European Education Area, the Digital Education Action Plan, and the European Alliance for Apprenticeships are designed to equip citizens with the necessary skills for the digital age and the changing work environment.

While EU-wide initiatives lay the groundwork, innovative research projects like TRAILS are crucial for providing policymakers with the tools and insights needed to develop targeted, effective strategies. The TRAILS project stands out for its multi-faceted approach to addressing the skills mismatch. Established in 2024, the project brings together key stakeholders from across Europe, including leading universities[1], the Economic and Social Research Institute, industry partners (SkillLab), the European Association of Regional and Local Authorities for Lifelong Learning, and Ipsos European Public Affairs. Such a collaborative approach is crucial to ensuring the development of practical, industry-relevant solutions that are directly applicable to real-world scenarios.

The TRAILS project aims to bring innovation to the skills research landscape by implementing new approaches to data collection and analysis that will better enable decision-makers to monitor skills gaps across EU Member States, mapping existing barriers for businesses and the degree of workforce adaptability. Hitherto, a key challenge in addressing the skills mismatch has been a lack of uniform data on the problem across the EU. This has not only made measurement difficult

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but has meant that different countries may base their policies on varying datasets, leading to fragmented approaches across the EU. A more consistent approach to data collection and analysis, in contrast, would enable policy-makers to make valid cross-country comparisons, identify common trends and support the development of targeted EU-level interventions to address the skills mismatch. To this end, TRAILS is integrating existing databases with new cross-country survey data, creating a standardised dataset that spans both employee and employer perspectives.

Another critical challenge in addressing the skills mismatch to date has been a lack of real-time or near-real-time data to capture the rapidly evolving landscape of workforce skills and employer demands. TRAILS is seeking to address this challenge by using Machine Learning (ML) algorithms to estimate workers' characteristics and task assignments, analysing matched employer-employee data. This represents a significant leap forward in skills mismatch measurement, as it will provide a more informed understanding of firms' needs vis-à-vis workforce skills. Furthermore, the approach will help identify which types of mismatches are growing within specific sectors or workforces, in turn allowing for more targeted remediation measures.

Of course, addressing the skills mismatch also demands an upskilling and reskilling of the workforce via accessible training. Adult learning participation is crucial in this regard, as it helps workers meet labour market demands and maintain employment. A recent study found that 13% of EU workers are significantly digitally under-skilled, with 39% moderately so. Of these workers, fewer than half (46%) have participated in any form of digital skills training, and only around a quarter (27%) have participated in non-ICT-related training. Twenty-seven percent have not participated in any training at all. This indicates that a significant proportion of workers still face barriers to accessing and participating in digital skills

development opportunities. To help address this, TRAILS is analysing big data from various sources, such as online job postings, social media platforms, and educational databases, and combining it with the ESCO taxonomy (a standardised classification of European skills, competences, qualifications, and occupations). The aim is to identify skills gaps, forecast emerging skills requirements, suggest tailored training programmes, and assess the impact of different training initiatives on employability and career advancement.

TRAILS exemplifies how innovative research can enhance our understanding of the skills mismatch. Leveraging big data and AI demonstrates a new approach to studying labour market dynamics that can usefully inform develop targeted policy solutions.

More information about the TRAILS project is available at www.trails-project.eu.

Read more

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EMPOWERING HEALTH CHOICES:
BOOSTING VACCINE ACCEPTANCE THROUGH HEALTH LITERACY

The COVID-19 pandemic has left an unexpected legacy in the form of increased scepticism towards routine vaccinations. This article explores two key drivers of this spillover effect: the spread of misinformation on vaccines and the rapid growth of the consumer wellness industry. It then considers how public health literacy can help to address vaccine scepticism by reshaping both citizens' vaccine beliefs, and the way healthcare professionals communicate about vaccination.

As outlined by the World Health Organisation (WHO), vaccination is one of the most powerful tools available to prevent communicable diseases. Accordingly, the rapid development and subsequent rollout of multiple variants of the COVID-19 vaccine across the world during 2020 and 2021 was widely hailed as a major medical accomplishment. At the same time, however, the COVID-19 pandemic was also marked by increasing rates of vaccine hesitancy, including

here in the European Union (EU). A Flash Eurobarometer survey, conducted by Ipsos in 2021, revealed that 31% of EU citizens could be classified as vaccine-hesitant based on their intentions to get vaccinated. In the aftermath of the pandemic, the spillover effects of COVID-19 vaccine hesitancy on uptake of other vaccines is becoming clear. For instance, statistics from the WHO show that first-dose measles vaccine coverage fell by two percentage points across the EU between 2019 and 2022. Similarly, an EU report on vaccine confidence shows that the number of respondents regarding vaccination as important declined from 91.8% in 2020 to 81.5% in 2022. A recent study published in Nature revealed that 23.1% of people worldwide report decreased willingness to receive vaccinations for diseases other than COVID-19 as a result of the pandemic.

Drivers of vaccine hesitancy

While the impact of COVID-19 on general vaccine hesitancy is clear, it is crucial to understand the factors driving this trend as a preliminary step towards addressing the problem. One commonly cited driver is misinformation spread by both mainstream and fringe media, as well as via social media. Illustrating the reach of such misinformation, a study conducted by Ipsos in the UK revealed that 59% of people were familiar with a conspiracy theory claiming that the COVID-19 vaccine was a cover for implanting trackable microchips in humans. Results from a report we prepared for the European Commission Joint Research Centre (JRC) show that even brief exposure to vaccine-critical information or misinformation increases vaccine hesitancy and that this is further influenced by people's age, education and income level.

Another potential driver of vaccine hesitancy may be the exponential rise of wellness (or 'self-care') as a lifestyle trend and one that is concerned in part with reducing reliance on conventional medical interventions. Ipsos' Global Trends report of September 2024 found that 80% of people worldwide wanted to have more control over their health, and 69% looked up health information online instead of relying on the advice of doctors. This is especially true in countries with limited medical infrastructure or costly healthcare. For example, our research in the US has revealed that 57% of Americans use smart wearables because these help them to monitor their own health. Clinicians themselves appear to be acutely aware of the self-care trend. Indeed, Ipsos has found that in Europe more than half of this group agree that people have become more empowered to manage their own health conditions, with 69% expecting that in the future more patients will proactively review their medical records themselves. Although a shift towards self-care may in some senses be seen as empowering, studies have pointed out that this increase of consumerism in health care may contribute to vaccine hesitancy by generating the belief that a healthy body, maintained through wellness practices, can manage infections by itself without the need for vaccines.

Health literacy as a booster of vaccine acceptance

Alongside tackling disinformation and potential downsides of the self-care trend, health literacy has been identified as another important counterbalance to vaccine hesitancy. A systematic review of the relationship between health literacy and COVID-19 acceptance, for example, has shown that people with higher health literacy typically hold more positive attitudes on vaccination. Because of this important role that health literacy can play in vaccine acceptance, researchers have introduced the concept of vaccine literacy, which refers to people's knowledge and competencies to access, understand, and use vaccination information to make decisions about their own health and healthcare. A meta-analysis of citizens' health literacy levels across Europe showed that, depending on the literacy assessment method applied, 27% to 48% of EU citizens report low health literacy skills. Increasing these literacy levels could have a significant impact on vaccination uptake. Indeed, the JRC study referenced earlier found that parents with higher health literacy were less likely than those with lower literacy to skip the MMR vaccine for their children.

It is important to note that health literacy is often wrongly viewed as a personal trait, something that only citizens themselves are responsible for developing. This is a misconception, as health literacy does not exist in a vacuum but is shaped by a wide range of societal factors, particularly people's interactions with the medical system. The WHO highlights the concept of professional health literacy, referring to the fact that healthcare practitioners need to be attentive to how they communicate with their patients to ensure they are presenting information in suitably lay terms. This more integrative view of health literacy might be particularly important within the context of vaccination.

Overall, increasing both citizens' and health care professionals' health literacy levels could help individuals better understand information about vaccination, detect misinformation more effectively, and remain critical of the aforementioned consumer wellness industry.

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THE STATE OF DEMOCRACY: A CALL FOR REFORMS

Against a backdrop of political turbulence and growing unrest in Europe, our recent study on the state of democracy conducted across seven European countries (Croatia, France, Italy, the Netherlands, Poland, Spain and Sweden) has unveiled a substantial gap between public expectations and the functioning of democratic systems. Despite a slight improvement since 2023, significant proportions of citizens continue to be dissatisfied with the way democracy is working in their respective countries.

Key findings:

Dissatisfaction with democratic functioning is highest in France (at 55%), followed closely by Italy and Spain (both 51%), and Croatia (49%). While the other countries surveyed show lower levels of dissatisfaction, Sweden is the only country in which a majority (68%) are satisfied with their democracy.

In almost all of the countries, more citizens think democratic functioning has deteriorated over the last five years than think it has improved. Poland is the exception, where just over half (53%) perceive improvement, possibly due to the change in government there following the autumn 2023 elections.

In all of the countries, large numbers of citizens favour radical change to the political system, believing it is rigged in favour of the rich and powerful, and that leaders disregard citizens' needs. These sentiments find particularly strong expression in Italy and Croatia.

A substantial proportion of respondents across the countries – ranging from 25% in Sweden to 60% in Croatia – view political participation as ineffective in driving change. Despite this scepticism, a clear majority in all of the countries still consider voting crucial. Many citizens also engage in other civic activities such as signing petitions, boycotting products, voicing political opinions on social media, and participating in demonstrations.

The European Union consistently receives more positive than negative evaluations. Positive sentiment is especially strong in Poland and Sweden, where it exceeds 50%. Meanwhile, the highest level of negative sentiment is found in France (28%), followed by Italy and the Netherlands (both at 25%).

In all, the study reveals a complex picture of modern democracy, characterised by widespread dissatisfaction, a desire for change, and a level of ambivalence towards political engagement. The findings underscore the urgent need for policymakers to listen actively and bridge the widening gap between citizens and their governments, ensuring the preservation and strengthening of democratic ideals for future generations.

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PUBLICATION PREVIEW:
ESENER 2024

The European Pillar of Social Rights Action Plan, adopted in 2021, places a strong emphasis on improving working conditions and occupational safety across the EU. The EU Strategic Framework on Health and Safety at Work 2021-2027 underscores the EU's commitment to adapting workplace safety standards to the new realities of the digital and green transitions.

The fourth **European Survey of Enterprises on New and Emerging Risks (ESENER 2024)** is set to reveal crucial insights into how European workplaces are managing health and safety in a rapidly changing world. As we await the imminent publication of the results, here's a preview of the key questions the survey will answer:

Pandemic impact on occupational safety and health (OSH): How has Covid-19 reshaped workplace OSH practices? Will we see an increase in employers taking steps to boost employee health?

Evolution of remote work: With hybrid and remote work having become mainstream, how are companies adapting their OSH strategies? And has the proportion of employees working from home continued to increase since 2020, or has it returned to pre-pandemic levels?

Digital transformation: With the accelerated adoption of digital technologies, how are businesses addressing new OSH challenges? Are they discussing the potential impacts of AI, robotics, and performance monitoring systems on workers' wellbeing?

Psychosocial risks: In an era of increased work intensity and blurred work-life boundaries, has there been a shift in how businesses approach stress, burnout, and other psychosocial risks?

Emerging Risks: What new health and safety concerns are on the radar of European businesses? How are they preparing for future challenges?

ESENER 2024 was conducted primarily by telephone among a representative sample of 41,458 establishments with five or more employees. It covers all economic sectors) across the 27 EU Member States, Norway, Iceland, and Switzerland. Stay tuned for the first results in early 2025, which will allow for in-depth analysis by company size and sector, providing invaluable insights for policymakers, employers, and OSH professionals.

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THE IPSOS AI MONITOR 2024

A 32-country Ipsos Global Advisor Survey

June 2024

The Wonder and the Worry of AI

With 2024 having unfolded as a pivotal year for advancements in generative AI, it's crucial to understand public sentiment and future expectations surrounding these developments. Explore these insights in our Ipsos AI Monitor.

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Still feeling the pinch

Our latest Cost of Living Monitor shows that, across 32 countries, 37% of consumers still think they are worse off than they were before the COVID pandemic.

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Growing stronger

Our Global Predictions Report reveals that an average of 65% of consumers thought 2024 was a bad year for their country but this is actually lower than the equivalent in 2023 (70%) and well down on the 90% recorded in 2020, as people looked back at the first year of the COVID-19 pandemic.

Read more

WEBINARS

2024 in Review: A Year of Global Shifts

Our year-end episode looked back over the momentous events that will likely define 2024 in the years that follow. The main segments covered included:

Lessons from the elections: Democracy's critical juncture worldwide

AI takes center stage: Generative AI's real-world impact on consumers and businesses

Access the webinar

2025 – The Year Ahead

KEYS – A WEBINAR SERIES BY IPSOS

Join us as we kick off the new year with the first in a series of analyses of the key trends and developments that will shape 2025. This episode will delve into emerging global challenges and opportunities, offering valuable perspectives to help navigate the year ahead.

Register

WHITE PAPER

Spotlight on Mixed-Mode Survey Methods

Don't miss this crucial resource for professionals seeking high-quality samples: Our Scottish team has released an in-depth review of mixed-mode methods, offering valuable insights for long-term survey strategies. The report includes a decision-making framework to optimise your approach. Stay ahead in the evolving landscape of market research methodologies.

The summary report   **The full report**

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